Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Orders and Workflow Follow-up Tab

Last Modified on 12/09/2019 3:25 pm EST

Version 14.19

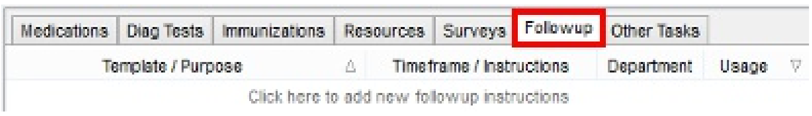
Overview

This section of template design demonstrates the edit or addition of follow up tasks associated to a template.

- **Add a Follow up**
- **Edit a Follow up**
- **Delete a Follow up**

Add a Follow Up

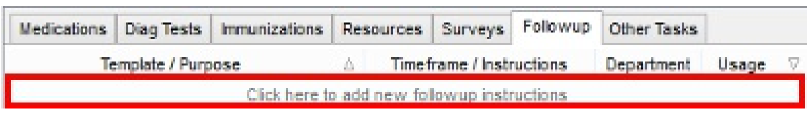
1. Review the Follow up tab.
   - Click the **Followup** tab.



Encounter Template Editor: Assess/Plan Followup Tab

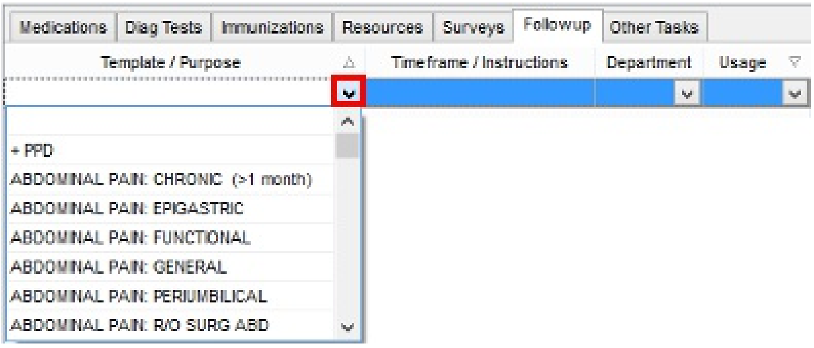
2. Click the **Insert Record** button  .

Note: You may also click into the add new record field.



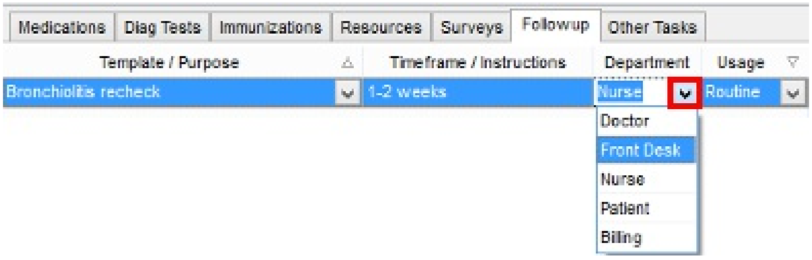
3. Select a follow up **Template** from the Template/Purpose drop-down menu. If there is no template to select for the follow up, you may type in the Template/Purpose field. If a template

is selected, the appointment will be made using the selected template.



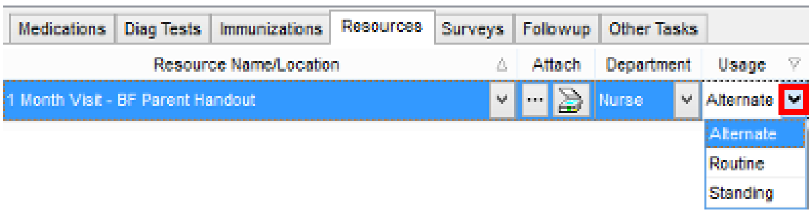
4. Type instruction for follow up in the Timeframe/Instructions field.

5. Select a **Department** from the drop-down menu.



Encounter Template Editor: Department

6. Click the **dropdown arrow** and select a Usage.



Encounter Template Editor: Usage

Usage	Definition
Alternate	Will show the item in the task window. An alternate item needs to be selected at time of charting.
Routine	Will show the item in the task window with a checkmark already selected in the add box. A routine item is selected for task submission at time of charting.

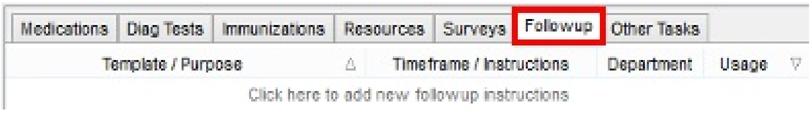
Usage	Definition
Standing	A standing order is submitted as a task to the selected department when the template is used at time of charting.

7. Click the **Post edit** button .

Edit a Follow Up

1. Review the Follow up tab.

   - Click the **Followup** tab.



Encounter Template Editor: Assess/Plan Followup Tab

2. Click to highlight the follow up to edit.

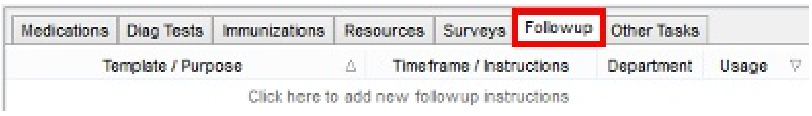
   - Click the **dropdown arrow** in the Template/Purpose field, select a template or type the purpose.
   - Add or edit the Timeframe/Instructions.
   - Click the **dropdown arrow** in the Department field, select a Department.
   - Click the **dropdown arrow** in the Usage field, select a Usage.

3. Click the **Post edit** button .

Delete a Follow Up

1. Review the Follow up tab.

   - Click the **Followup** tab.



Encounter Template Editor: Assess/Plan Followup Tab

2. Click to highlight the follow up to delete.
3. Click the **Delete record** button.

Version 14.10

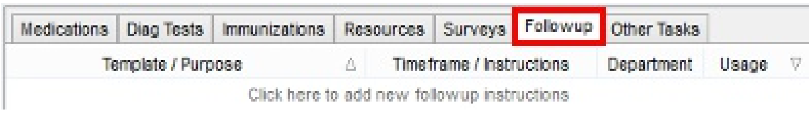
Overview

This section of template design demonstrates the edit or addition of follow up tasks associated to a template.

- **Add a Follow up**
- **Edit a Follow up**
- **Delete a Follow up**

Add a Follow Up

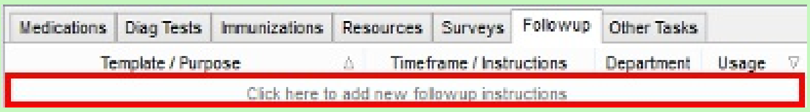
1. Review the Follow up tab.
   - Click the **Followup** tab.



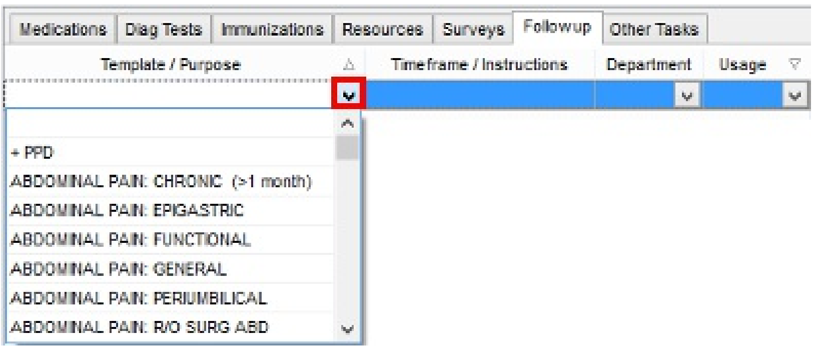
Encounter Template Editor: Assess/Plan Followup Tab

2. Click the **Insert Record** button  .

You may also click into the add new record field.



3. Click the **dropdown arrow** in the Template/Purpose field and select a follow up template.



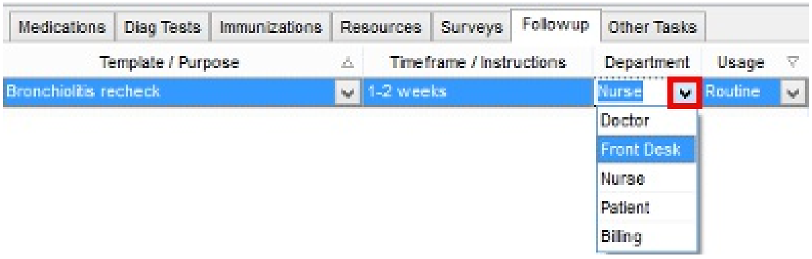
Encounter Template Editor: Assess/Plan Followup Template Selection

If there is no template to select for the follow up, you may type in the Template/Purpose field. If a template is selected, the appointment will be made using the selected template.

4. Type instruction for follow up in the Timeframe/Instructions field.

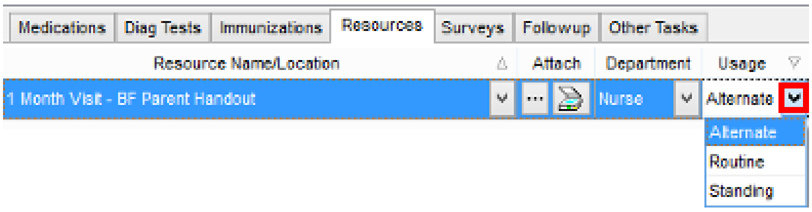
Encounter Template Editor: Assess/Plan Timeframe/Instructions

5. Click the **dropdown arrow** and select a Department.



Encounter Template Editor: Department

6. Click the **dropdown arrow** and select a Usage.



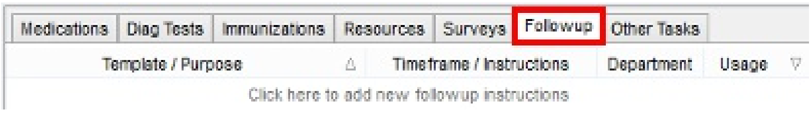
Encounter Template Editor: Usage

Usage	Definition
Alternate	Will show the item in the task window. An alternate item needs to be selected at time of charting.
Routine	Will show the item in the task window with a checkmark already selected in the add box. A routine item is selected for task submission at time of charting.
Standing	A standing order is submitted as a task to the selected department when the template is used at time of charting.

7. Click the **Post edit** button .

Edit a Follow Up

1. Review the Follow up tab.
   - Click the **Followup** tab.

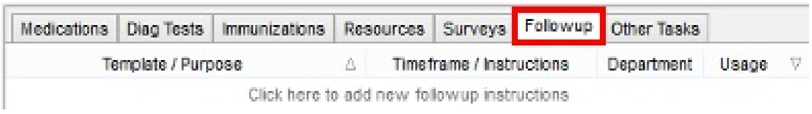


Encounter Template Editor: Assess/Plan Followup Tab

2. Click to highlight the follow up to edit.
    - Click the **dropdown arrow** in the Template/Purpose field, select a template or type the purpose.
    - Add or edit the Timeframe/Instructions.
    - Click the **dropdown arrow** in the Department field, select a Department.
    - Click the **dropdown arrow** in the Usage field, select a Usage.
3. Click the **Post edit** button .

Delete a Follow Up

1. Review the Follow up tab.
    - Click the **Followup** tab.



Encounter Template Editor: Assess/Plan Followup Tab

2. Click to highlight the follow up to delete.
3. Click the **Delete record** button.